

Adobe InDesign Procedures for Producing Section 508 Accessible PDF Documents For NRTR, NRR, and NRDS Report Series: and the NPS Inventory & Monitoring Program

(4/11/2014)

Introduction

The examples and procedures outlined in this document work best using Adobe InDesign CS6 or later and Adobe Acrobat Pro 10 or later. Earlier versions of these software programs are not recommended.

This document provides guidance and procedures for generating accessible Adobe Acrobat (PDF) documents per [Section 508 of the Rehabilitation Act](#) (Section 508). It was written as an informal training and reference manual for NPS publication policy specialists working in the national NPS Inventory & Monitoring Division office. Other NPS and Inventory & Monitoring Program offices may also use these procedures to generate accessible PDF documents.

The procedures outlined in this document show the user how to use existing tools that are built into MS Word and Adobe Acrobat Pro to automatically add website markup tags into documents exported to PDF format. These PDF markup tags allow screen readers to correctly read the document aloud to the visually and cognitively impaired (per Section 508 policy). PDF markup tags do not change how pages print or look on the computer screen for sighted users.

This document is a work in progress. Please contact [Fagan Johnson](#) if you have any questions or see something that needs to be changed.

Outline of the Suggested Procedures

- 1) Adobe InDesign documents should be formatted using the basic techniques outlined in this document. Working examples of these procedures are also found in our document templates.
 - a) NPS Inventory & Monitoring Program briefs and small documents. Available for download at: <http://science.nature.nps.gov/im/reports/index.cfm?tab=0&BriefsTemplates=open#BriefsTemplates>
 - b) NPS-wide Natural Resource Technical Report (NRTR), Natural Resource Report (NRR) and Natural Resource Data Series (NRDS) report series. Available for download at: <http://www.nature.nps.gov/publications/nrpm/nrrmrtr.cfm>
- 2) Use the PDF export techniques outlined in this document, and in our document templates, to help make sure that the required website accessibility tags are automatically exported into the final PDF version of the document.
- 3) Open the PDF document in Adobe Acrobat Pro and use the guidance document [I&M Adobe Acrobat Pro Guidance for Making PDF Documents Section 508 Accessible](#) to make sure that each page in the final PDF is Section 508 accessible.

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Adobe InDesign Procedures

Working examples and additional guidance for most of the procedures outlined in this chapter are also provided in the latest Adobe InDesign templates provided for:

- NPS Inventory & Monitoring Program briefs and small documents. Available for download at: <http://science.nature.nps.gov/im/reports/index.cfm?tab=0&BriefsTemplates=open#BriefsTemplates>
- NPS-wide Natural Resource Technical Report (NRTR), Natural Resource Report (NRR) and Natural Resource Data Series (NRDS) report series. Available for download at: <http://www.nature.nps.gov/publications/nrpm/nrrnrtr.cfm>

When working with Adobe InDesign CS6 or later (earlier versions are not recommended) making the final PDF file accessible for reports generated in Adobe InDesign is relatively easy. Just make sure to:

- 1) Use Paragraph Styles that are set to export to PDF format using accessibility tags (see subchapter: *Adobe InDesign Procedures / Use Paragraph Styles for All Text Elements*).
- 2) Provide alternate text for all figures, images, and other graphic elements (see subchapter: *Adobe InDesign Procedures / Graphic Elements*).
- 3) Design tables to be accessible in the final PDF (see subchapter: *Formatting Tables in Adobe InDesign*).
- 4) Export the final Adobe InDesign document to PDF format in a way that assures that accessibility tags are exported to PDF correctly (see subchapter: *Adobe InDesign Procedures / Exporting the Final Adobe InDesign Document to PDF Format*).

This document is a work in progress. Please contact [Fagan Johnson](#) if you have any questions or see something that needs to be changed.

Use Paragraph Styles for All Text Elements

All text elements in I&M briefs, reports, and other documents generated using Adobe InDesign should use the proprietary fonts: [Adobe Frutiger LT Std](#) and [NPS Rawlinson OT](#) (click links to download and install these fonts as needed, NPS only).

To install these fonts on most Windows machines, simply unzip the zip files inside the `C:\Windows\Fonts\` folder. If you do not have permission to do this on your computer, contact your local NPS IT staff for assistance.

The only instances when non-proprietary fonts are allowed in I&M briefs, reports, and other documents produced in Adobe InDesign: are for text inside charts and/or figures, complicated mathematical formulas (use appropriate font symbols as required), and for computer output and application instructions (use *Courier New* font).

After installing the proprietary fonts, using the Paragraph Styles built into one of our document templates above, is the simplest way to consistently apply the NPS proprietary fonts throughout an entire document.

More About NPS Rawlinson Font Variations

There are three basic variations of *NPS Rawlinson OT* font. You may use any of these variations as you see fit inside your reports. Descriptions of these variations and some suggestions for use are below.

NPS Rawlinson OT Condensed (in MS Word: NPSRawlinsonOTCn): Was primarily designed to save print space. With regular paragraphs, many people also find this variation the easiest to read on a computer screen. We suggest that you use this font variation for regular paragraph text for most I&M briefs, brochures, and reports.

NPS Rawlinson OT (in MS Word: NPSRawlinsonOT): Was the basis for all other variations of this font. It was designed primarily for print distribution. Many people find it easier to read on printed pages than *NPS Rawlinson Condensed*. We suggest that you use this variation for regular paragraph text inside any report with a significant print distribution (more than 50 printed copies will be distributed).

NPS Rawlinson OT Oldstyle (in MS Word: NPSRawlinsonOTOld): Was designed to be a more ornate and elegant variation. Some people find this variation the easiest to read on printed pages, while others reserve it primarily for report titles, quotes, etc. This variation also works well as regular paragraph text for reports with a significant print distribution.

About the Paragraph Styles Used in Template Headings

Section heading examples provided in our I&M brief and brochure templates use Paragraph Styles *I&M brief H1 – H3*. Headings in Adobe InDesign templates for NRTR, NRR, and NRDS reports use Paragraph Styles *nrps Heading 1–5*. These heading Paragraph Styles are set to export to PDF format with standard HTML markup heading tags *H1 – H3*. This arrangement helps to assure that report headings will be read correctly by software for the visually-impaired (per Section 508).

As long as you use NPS proprietary fonts, and assign that text to a Paragraph Style that is also set to tag the final PDF with *H1–3* tags, as appropriate, you may edit and update the heading font and related text effects as desired.

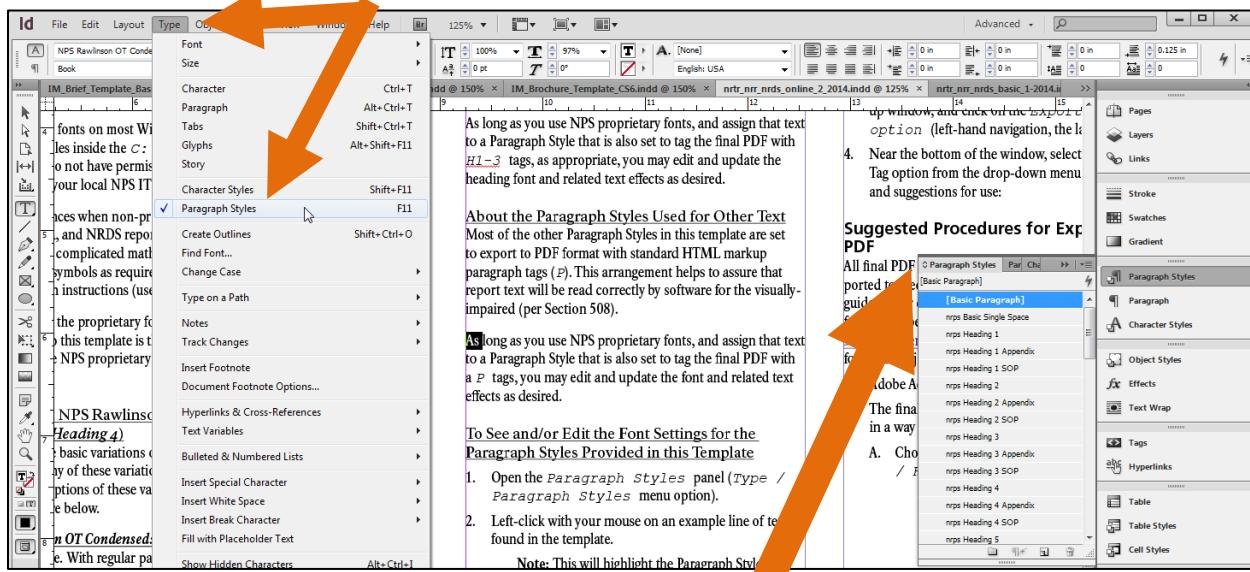
About the Paragraph Styles Used for Other Template Text

Most of the other Paragraph Styles in our document templates are set to export to PDF format with standard HTML markup paragraph tags (*P*). This arrangement helps to assure that report text will be read correctly by software for the visually-impaired (per Section 508).

As long as you use NPS proprietary fonts, and assign that text to a Paragraph Style that is also set to tag the final PDF with a P tags, you may edit and update the font and related text effects as desired.

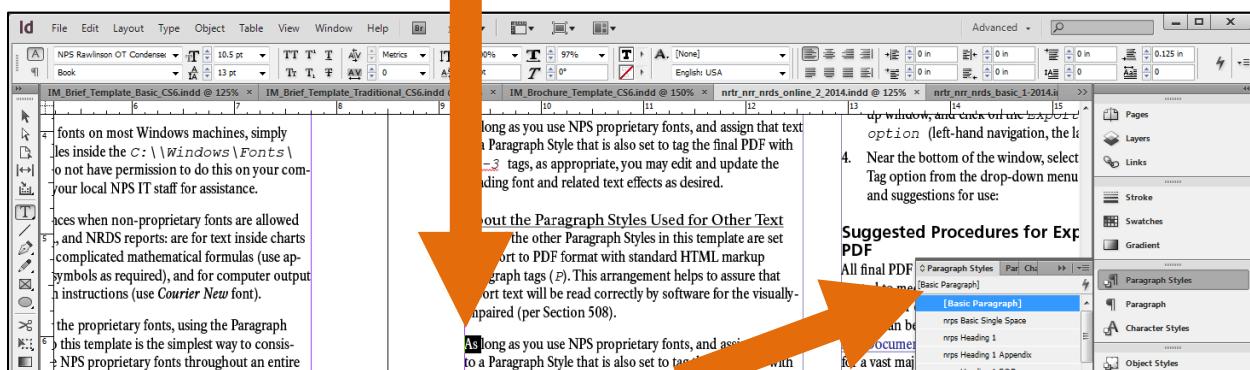
To See and/or Edit the Font Settings for the Paragraph Styles Provided in our Templates

- 1) Open the Paragraph Styles panel (*Type / Paragraph Styles* menu option).



This will open the *Paragraph Styles* menu. The computer displayed above has the Paragraph Styles menu docked along the right-hand side of the program screen (recommended).

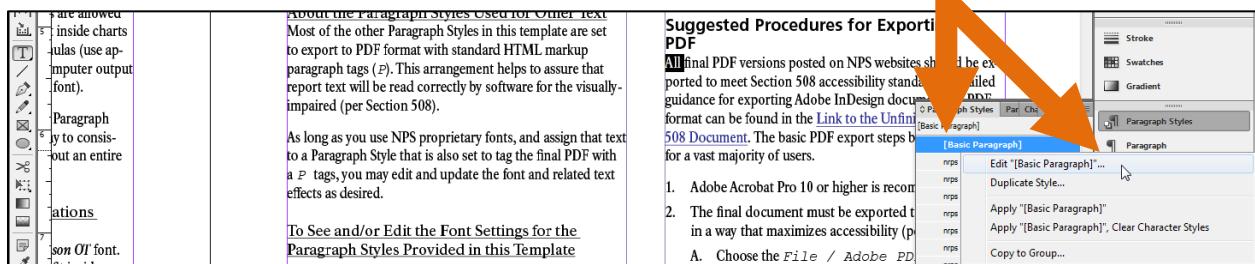
- 2) Left-click with your mouse and select/highlight the text of interest.



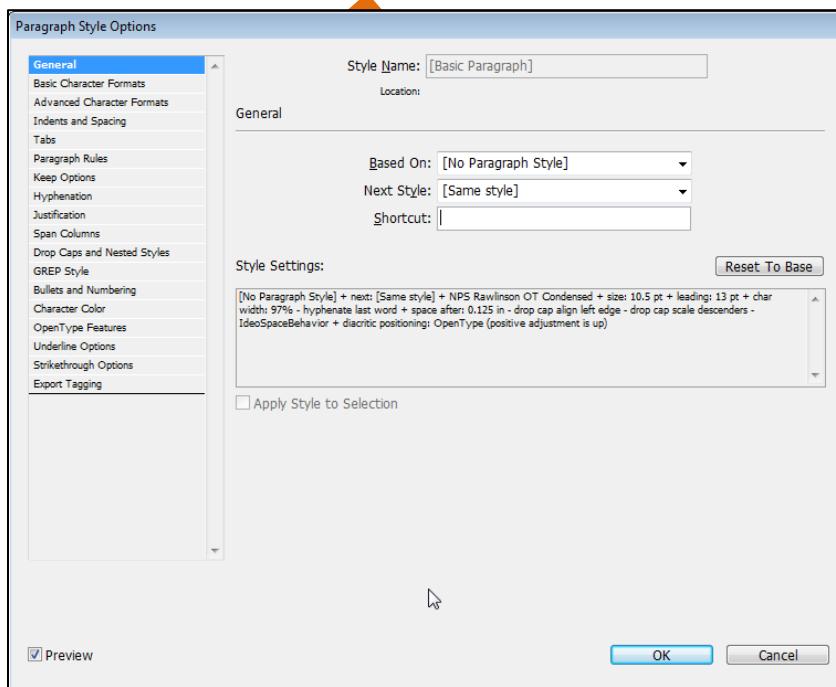
This will highlight the Paragraph Style used for that line of text in the *Paragraph Styles* panel.

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- 3) Right-click on the selected Paragraph Style, and choose the *Edit "...."* option (the first option).



- 4) On the *Paragraph Style Options* pop-up window, use the left-hand navigation menu to see and/or edit the attributes for that Paragraph Style.



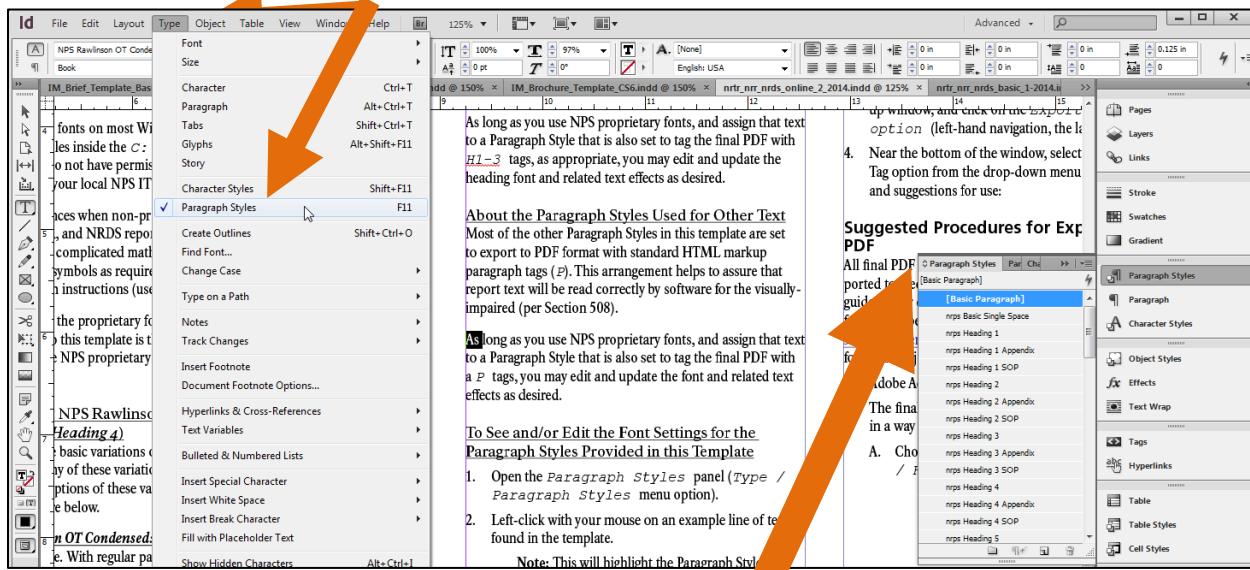
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Tagging Other Custom Paragraph Styles for Section 508 Accessibility Compliance

If you decide to use a custom set of Paragraph Styles, make sure that they are set to export to PDF format with the appropriate HTML markup tags (per Section 508).

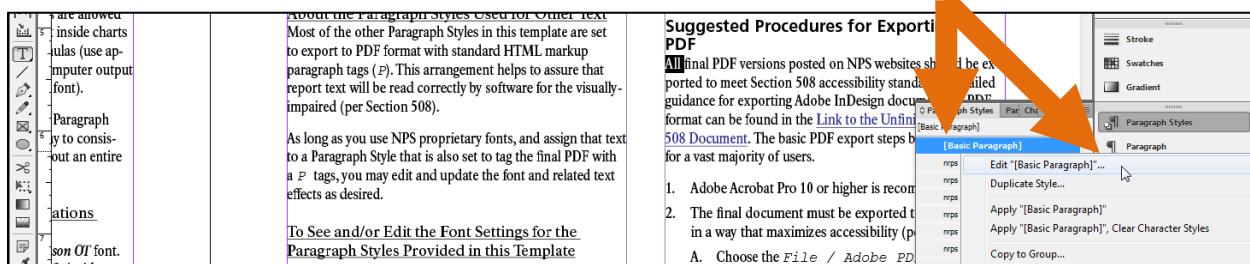
To do this for a single Paragraph Style:

- 1) Open the Paragraph Styles panel (*Type / Paragraph Styles* menu option).



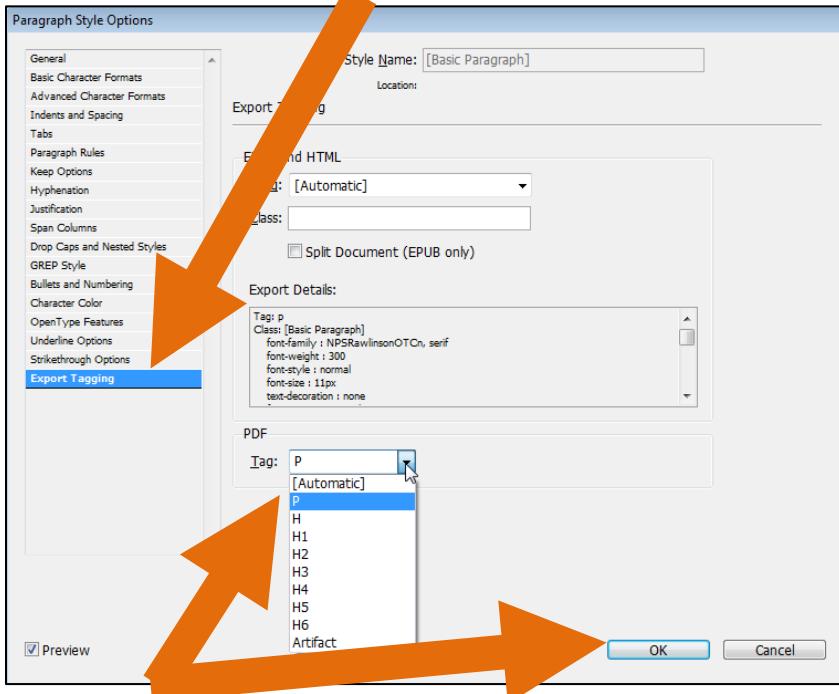
This will open the *Paragraph Styles* menu. The computer displayed above has the Paragraph Styles menu docked along the right-hand side of the program screen (recommended).

- 2) Right-click on the Paragraph Style of interest, and choose the *Edit "...."* option (the first option).



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- 3) On the Paragraph **Style Options** pop-up window, left-click with your mouse to select the Export Tagging option (the last option) in the left-hand navigation menu.



- 4) Near the bottom of the window, select the desired **PDF / Tag** option from the drop-down menu, and click the **OK** button. Available options and suggestions for use:

P (paragraph tag) : use this tag for all Paragraph Styles that will be used for any and all text that is not a Heading or an Artifact.

H1 - H5 (heading tags) : use these tags for all first through fifth order headings.

Artifact (background element that is skipped by screen readers) : use this tag for all headers and footer text, and is sometimes used for figure captions.

Graphic Elements (Figures, Images etc.)

The figures, images, and photographs found in the templates listed at the beginning of the *Adobe InDesign Procedures* chapter of this document provide working examples for the guidance and procedures below.

Adding Alternate Text to Graphic Elements

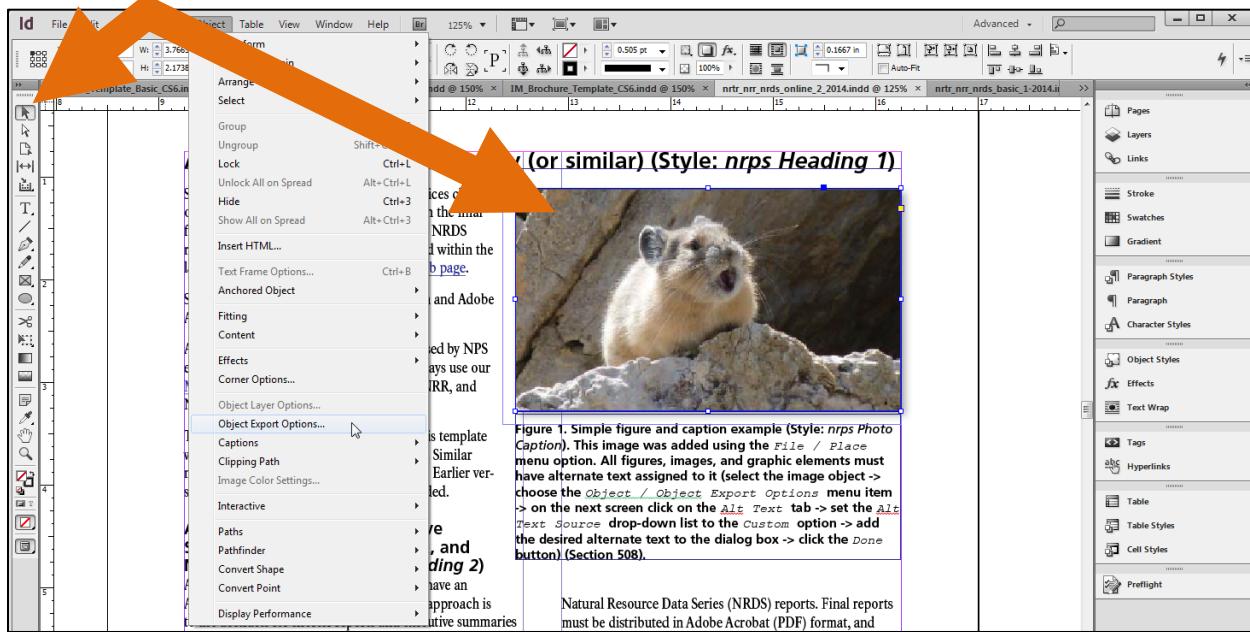
(Mandatory for all Maps, Images, Photographs, Graphic Shapes, etc.)

While we are very flexible with the format and layout of graphic elements, they all must have alternate text (per Section 508). Alternate text is read aloud by screen readers to people with visual and certain cognitive disabilities. The alternate text should be descriptive enough to entirely replace the graphic element for users that cannot see the graphic element.

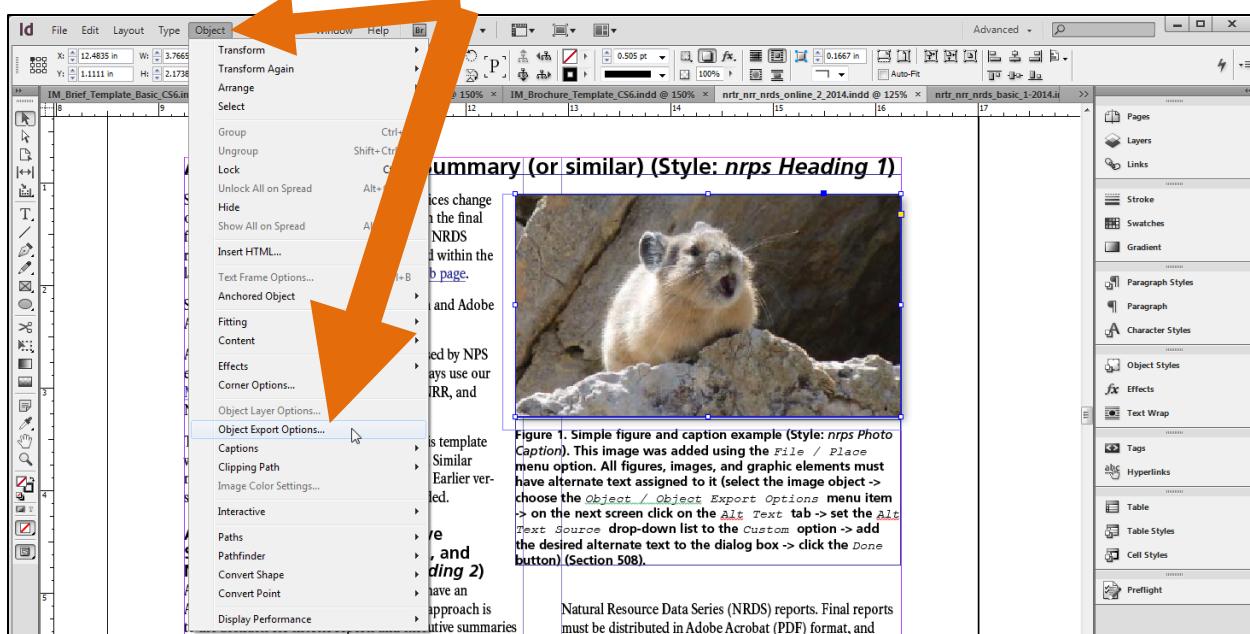
For documents that contain more than a handful of graphic elements, adding alternate text while in Adobe InDesign is the fastest and most efficient way to make sure that all graphics in the final PDF

have alternate text. To add alternate text to a graphic element that was previously added to an Adobe InDesign page:

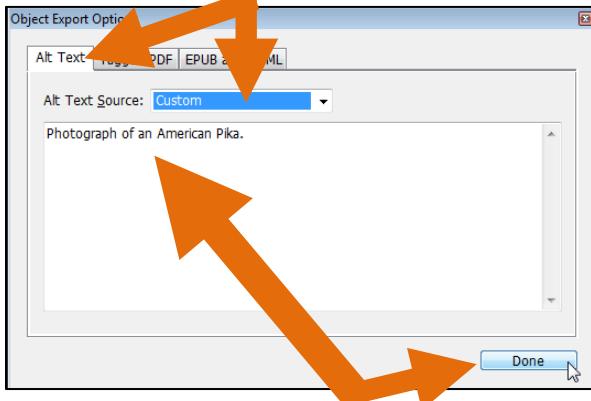
- 1) Left-click with your mouse on the *Selection Tool* option in the left-hand tool bar (usually the top-most option), and click on the *Image Frame* to select/highlight it.



- 2) Choose the *Object / Object Export Options* menu item.



- 3) On the next screen, left-click on the *Alt Text tab* and set the *Alt Text Source* drop-down list to the *Custom* option.



- 4) Add the desired alternate text to the dialog box, and click the *Done* button.

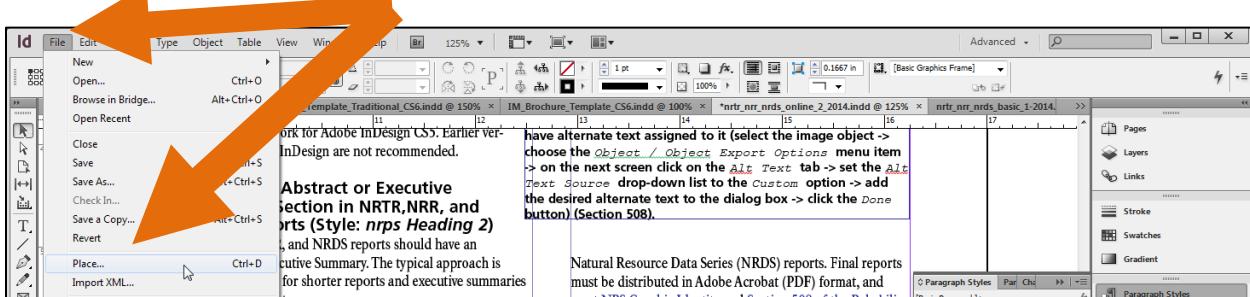
Importing Graphic Elements into Adobe InDesign

Graphic elements can easily be added to an Adobe InDesign document in multiple ways. Regardless of the type of image being imported, the original image should be relatively close to the print file size that will be used in the final page in Adobe InDesign. Image quality can degrade significantly whenever you enlarge the image size more than 10% - 15%, or shrink the image size more than 50%.

Importing Raster Image Files (.tif, .jpg, .png, .bmp, etc.)

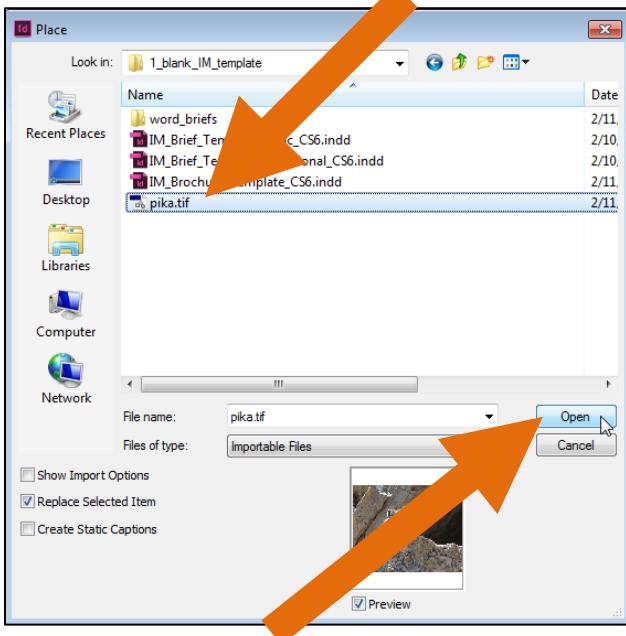
This is the most common method used to import images to Adobe InDesign. Images should be saved to at least 1,200 dots per inch (dpi) or greater (many print shops now suggest 2,400 dpi or greater), and approximately the same print size as will be used in Adobe InDesign.

- 1) In Adobe InDesign, choose the *File / Place* menu option.

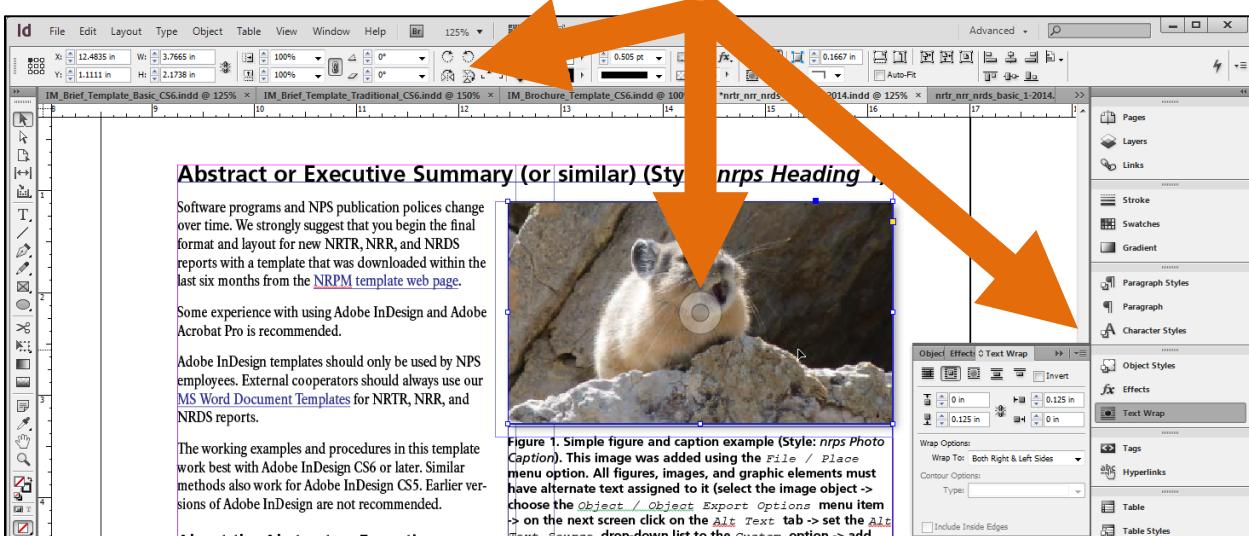


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- 2) On the next screen, use the navigation tools to find and and the desired file.



- 3) Click the *Open* button (this will place the full-sized image on the page).
- 4) Back on the Adobe InDesign page, edit and update the image position, size, and other settings as desired.



- 5) Make sure that there is alternate text for the new image (see the *Adding Alternate Text to Graphic Elements* section of this document).

Importing Vector Image Files (.ai, .eps, and .svg)

Vector images are often used for maps, logos, and to display mathematical and statistical charts. In vector images, text elements remain as standard font-based text and most line-type shapes are often exported as digital line elements (not converted to individual pixels). The text is almost always easier

to read, and the line elements are more clearly defined than typically found with raster images. The three most commonly used vector image file formats are described below.

Adobe Illustrator Format (.ai): Is fully supported by Adobe InDesign CS6, often providing the cleanest import results for vector graphics.

Encapsulated Post Script Format (.eps): Has traditionally been the primary choice for vector image files. While this file format is slowly being phased-out by Adobe, it is still favored by many software programs. There are often problems with importing .eps files into Adobe InDesign. Fortunately, you can quickly and easily convert .eps files to .ai format using Adobe Illustrator.

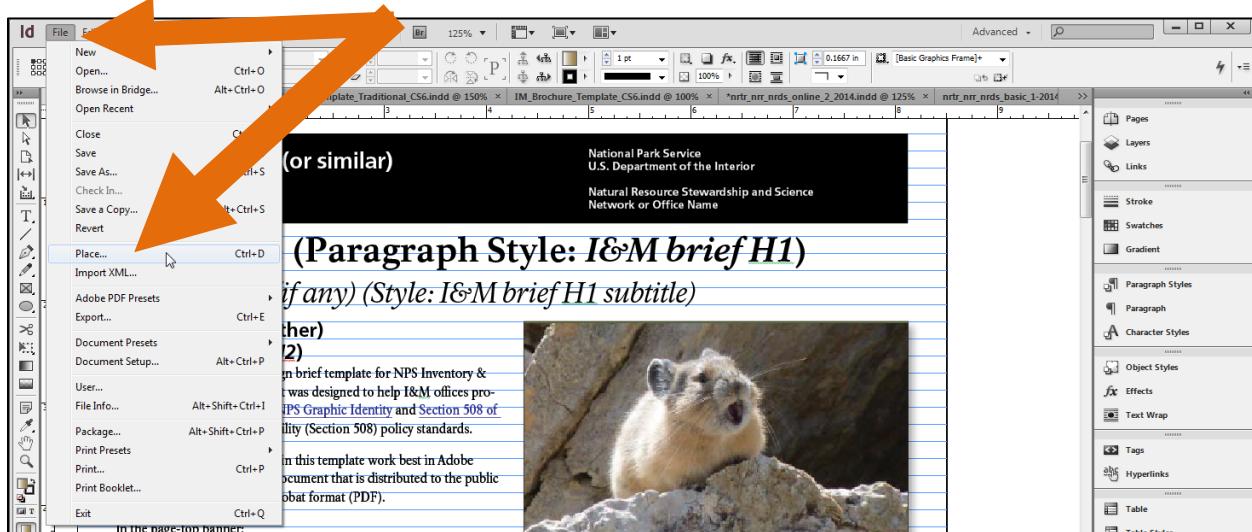
Scalable Vector Graphic Format (.svg): Is an open source file format that is often favored by users of prominent statistical and related graphic programs (SAS, SigmaPlot, R, etc.). There are often problems with importing .svg files into Adobe InDesign. Fortunately, you can quickly and easily convert most .svg files to .ai format using Adobe Illustrator.

Suggested methods to import vector images into Adobe InDesign:

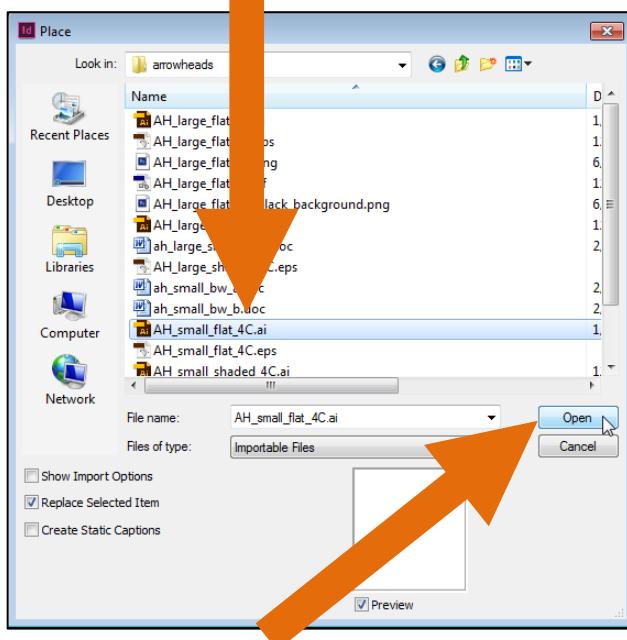
- 1) Make sure the vector image file that you want to import is in .ai file format.
 - a) If the file is in .eps or .svg formats, open the file in Adobe Illustrator CS5 or later.
 - b) Use the *File / Save* menu option to save a separate copy of the image to .ai format.

Note: If the new .ai file does not export with good enough quality to meet your needs, you may need to export the file to a raster format (.tif, .jpg, .png, .bmp, etc.) using the *File / Export* menu option (suggest .tif format at 1,200 dpi or greater).

- 2) When you have an image in .ai format, open Adobe InDesign and choose the *File / Place* menu option.

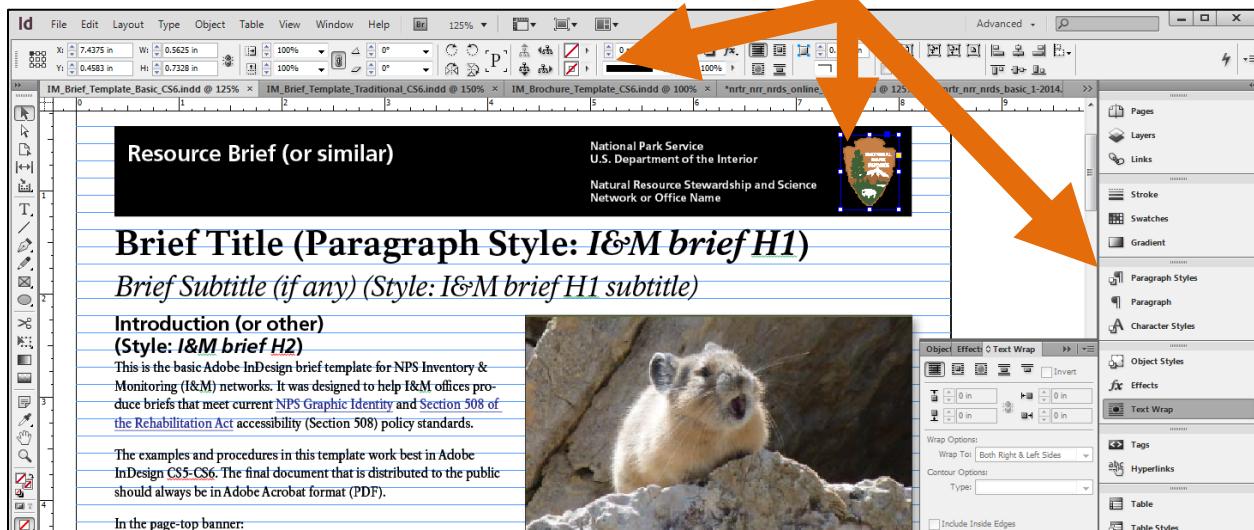


- 3) On the next screen, use the navigation tools to find and the desired file.



- 4) Click the *Open* button (this will place the full-sized image on the page).

- 5) Edit and update the image position, size, and other settings as desired.



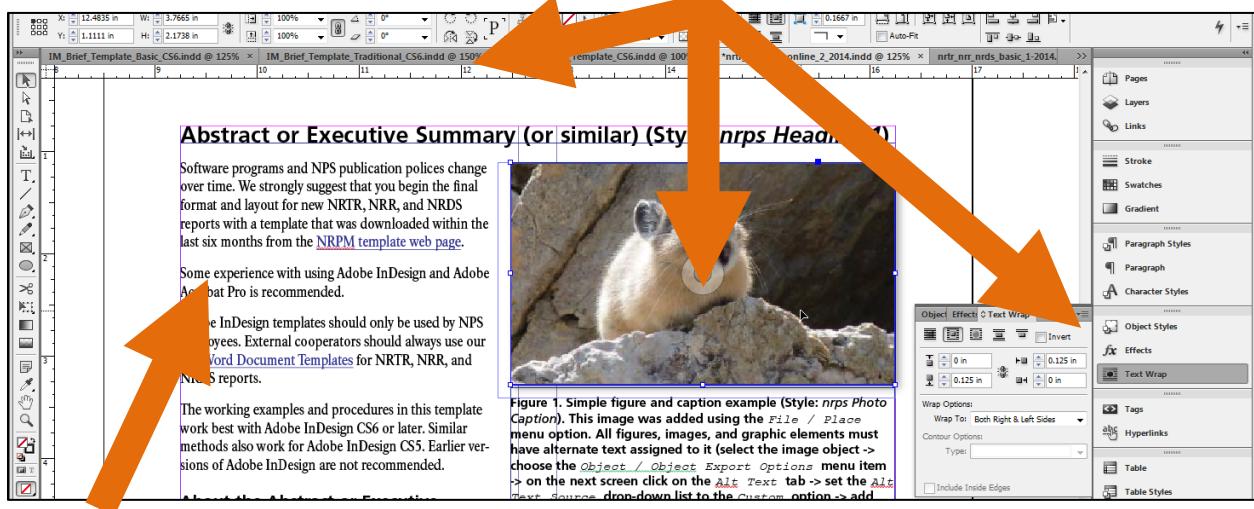
- 6) Make sure that there is alternate text for the new image (see the *Adding Alternate Text to Graphic Elements* section of this document).

Using the *Copy-paste* Method from Files Opened in Another Adobe CS6 (or later) Program

This is usually a good way to import images to Adobe CS6. Programs supported include: Adobe Illustrator, Adobe InDesign, and Adobe Photoshop. To import an image:

- 1) Open the file containing the image that you want it import in the desired Adobe CS6 (or later) program.

- 2) Select the image object(s) that you desire to import, and choose the *File / Copy* menu option.
- 3) In the target Adobe InDesign file window, use the *File / Paste* menu option to add the image to the desired page.
- 4) Edit and update the image position, size, and other settings as desired.



- 5) Make sure that there is alternate text for the new image (see the *Adding Alternate Text to Graphic Elements* section of this document).

Importing Images from PDF Documents

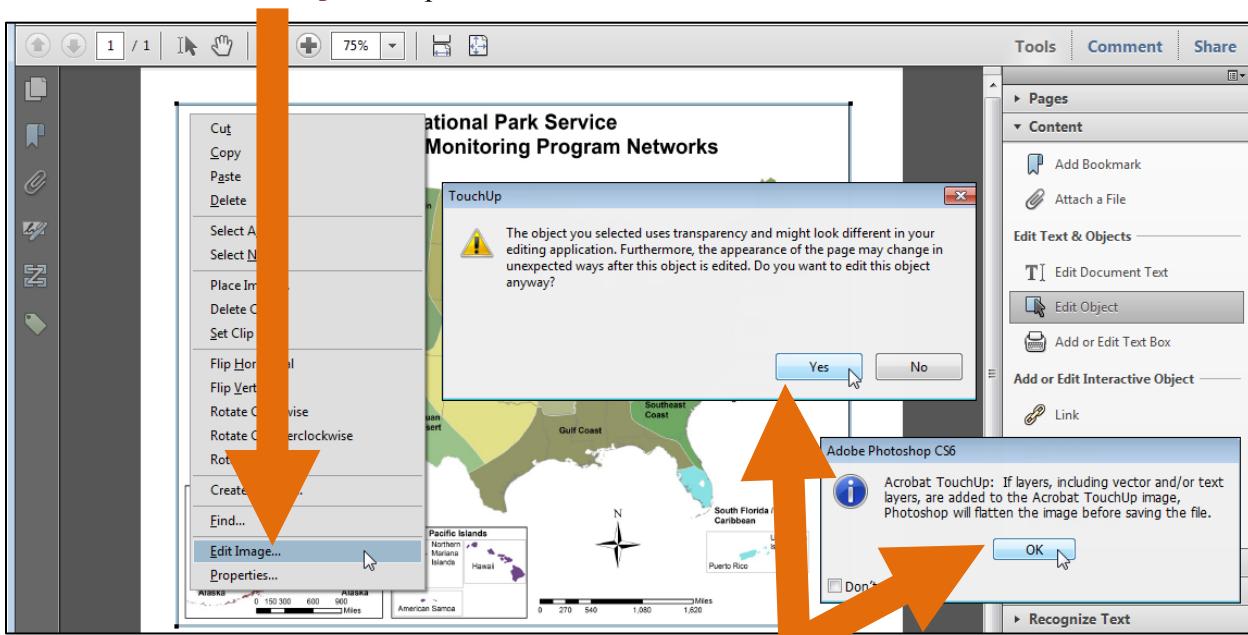
Importing images directly from PDF documents into Adobe InDesign almost always significantly degrades image quality, and is not recommended. To import images from PDF documents without significantly degrading the image quality, we suggest that:

- 1) With the document open the file in Adobe Acrobat Pro 10 or higher, select the *Tools / Content / Edit Object* menu option (located along the right-hand border of the program window).



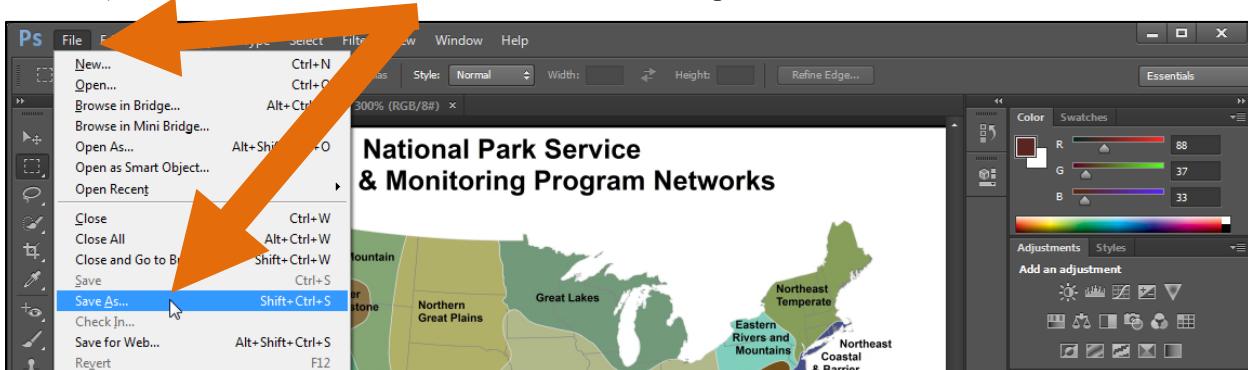
- 2) Left-click with your mouse, and draw a polygon around the image object(s) that you want to import. Selected objects will be highlighted.

- 3) Right-click with your mouse on any of the selected objects, and on the next pop-up screen, choose the *Edit Object* option.

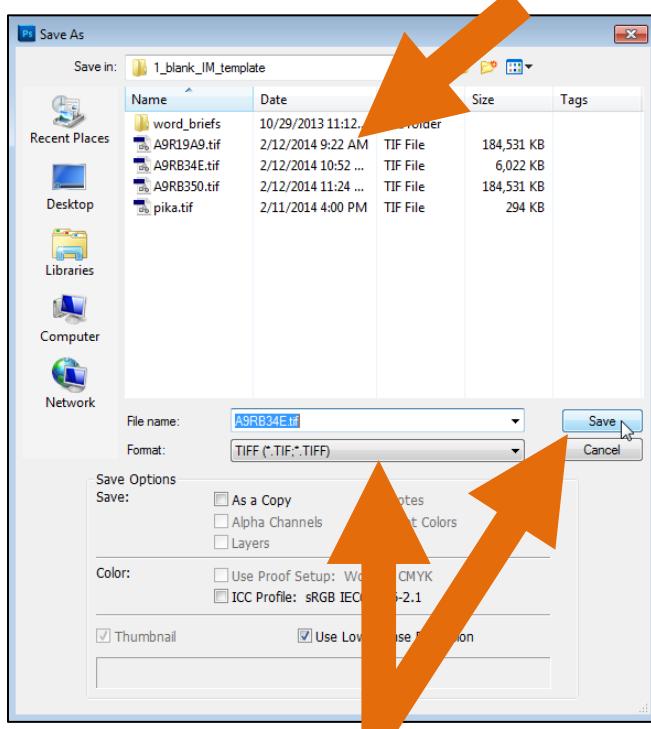


- 4) On the next couple of pop-up screens, click the *Yes* and *OK* buttons. This will automatically open the page in either Adobe Photoshop (if you selected a single raster image) or Adobe Illustrator (if you selected multiple page objects) (it may take a minute to finish loading).

- 5) Save the image to *.tif* format.
 - a) If the image opens in Adobe Photoshop (happens when you selected a single raster image):
 - i) Choose the *File / Save as...* menu option.



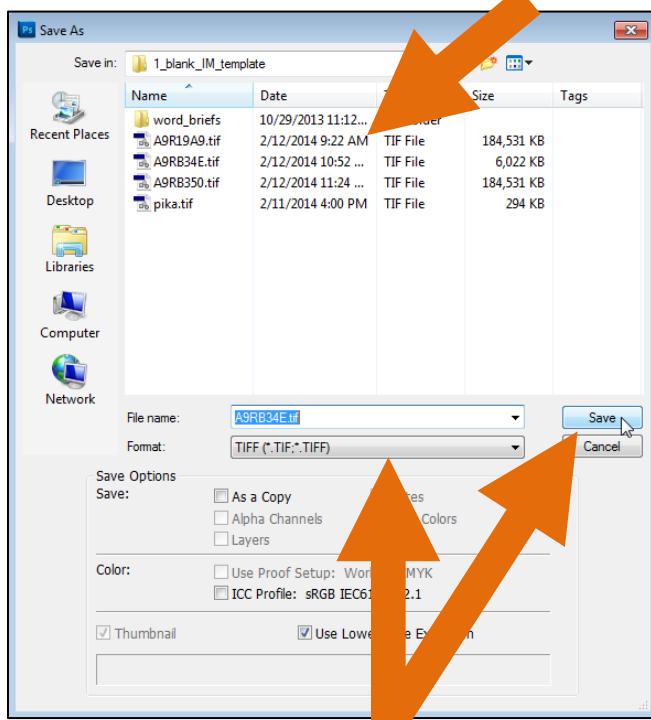
- ii) On the next screen, navigate to the desired file location (always defaults to a *Temp* folder on many computers).



- iii) In the *Format* drop-down menu, select the *TIFF (*.TIF, *.TIFF)* option, and left-click on the *Save* button. This will save the image as a stand-alone *.tif* file.
- b) If the file opens in Adobe Illustrator (happens when you selected multiple page objects):
- i) Select all page elements that you want to import into Adobe InDesign, and choose the *File Export* menu option.



- ii) On the next screen, navigate to the desired file location (always defaults to a *Temp* folder on many computers).



- iii) In the *Format* drop-down menu, select the *TIFF (*.TIF, *.TIFF)* option, and left-click on the *Save* button. This will save the image as a stand-alone *.tif* file.
- 6) In Adobe InDesign, import the *.tif* file like normal (see the *Importing Raster Image Files* section of this document).
 - 7) Make sure that there is alternate text for the new image (see the *Adding Alternate Text to Graphic Elements* section of this document).

Using the *Copy-paste* Method from Files Opened in Other External Programs

(MS Office, SigmaPlot, SAS, screenshots, etc.)

This should be used as an option of last resort, because it almost always significantly degrades image quality in printed copies of the document. Text and lines inside images are the most vulnerable to degradation.

Importing Map Images Exported from ArcMap

ArcMap versions 10 and later provide much more robust image export tools than were available with previous versions of the software. The most significant changes for users importing map images to InDesign are: much higher file export resolutions (measured in dpi), and more reliable tools for exporting maps to *.ai* format.

Most maps can be successfully imported to Adobe Acrobat from *.tif*, *.jpg*, or *.png* files that were exported directly from ArcMap using a 1,200 dpi or greater image resolution.

For maps with more complicated layouts, or numerous vector elements (text labels, lines, polygons, etc.), many users have had good luck with exporting the maps directly from ArcMap 10 and later to *.ai* format (also with 1,200 dpi or higher resolution).

We suggest that you only import map images from PDF files as a last resort. While this was the industry standard for many years, the raster and vector options described above almost always produce better results.

Choosing Colors to Convey Information

One of the clearest Section 508 statements concerning using colors can be found on the Web Accessibility in Mind Section 508 checklist webpage (<http://webaim.org/standards/508/checklist>):

- *The use of color can enhance comprehension, but do not use color alone to convey information.*
- *Be especially cautious of red/green color combinations. Make sure that color contrast is strong, especially between text and background.*

Here are some online tools that can help you to check images and colors for potential color blindness issues.

Webaim Saturation Checker (<http://webaim.org/resources/contrastchecker/>): A more traditional, and very reliable, tool that allows you to check colors after they are converted to grayscale values.

Vischeck (<http://www.vischeck.com/>): An online tool that allows you to simulate colorblind vision for individual image files.

ETRE Color Blind Simulator (<http://www.etre.com/tools/colourblindsight/>): An online tool that allows you to simulate colorblind vision for individual image files.

Coblis — Color Blindness Simulator (<http://www.color-blindness.com/coblis-color-blindness-simulator/>): An online tool that allows you to simulate colorblind vision for individual image files.

Formatting Tables in Adobe InDesign for Accessibility Compliance

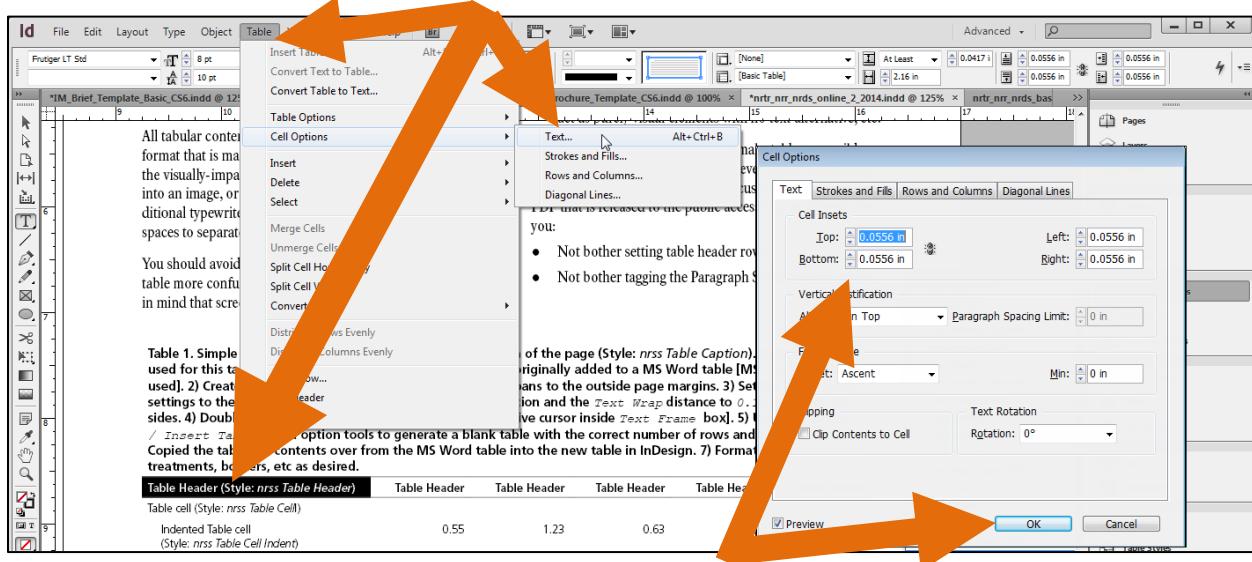
The tables found in the templates listed at the beginning of the *Adobe InDesign Procedures* chapter of this document provide working examples for the guidance and procedures below.

While we are very flexible with the format and layout of tables, they should always be accessible (per Section 508). Fortunately, the tools to export accessible tables from Adobe InDesign to PDF format are rather robust, and you only need to follow a small number of basic rules.

- 1) All tabular content with text or numerals must be in table format that is made up of individual table cells. Because software for the visually-impaired needs to be able to read the information aloud to the end-user:
 - a) Do not use graphic images or pictures of a table.
 - b) Do not use traditional typewriter formatting techniques (using tabs and spaces to separate columns).
- 2) Organize your table layouts to be read aloud by screen readers. Keep in mind that screen readers for the visually-impaired read the table aloud to the end user in a rather simplistic fashion:
 - a) Starting with the top-most row, the contents of each individual table cell is read aloud from left-to-right.
 - b) This process is repeated on each row until all cells in the table have been read aloud.

Some Basic Table Layout Suggestions

- 1) Do not combine or split table cells, or add blank columns or rows for purely graphic layout reasons. Instead:
 - a) Select / highlight a table cell, and choose the **Table / Cell Options / Text / Cell Insets** menu option



- b) On the next screen, set the **Cell Insets** values on each side as desired, and click the **OK** button.
- 2) Avoid adding graphic elements to hide words or cells, act as purely visual elements with no text alternative, etc.

Most other things recommended to specifically make an Adobe InDesign file accessible do not export very well PDF format. Since our primary focus is to make the final PDF that is released to the public accessible, we suggest that you:

- Not bother setting table header rows.

- Not bother tagging any Paragraph Styles used for tables.

About Landscape Pages in Adobe InDesign

In the past, landscape page content was added to NRTR, NRR, and NRDS reports generated using Adobe InDesign, was simply turned 90 degrees counter-clockwise on a standard portrait page. This practice made it easy to make sure that the page footers and headers printed in the same place on all pages. Unfortunately, this practice does not meet more recent Section 508 accessibility rules.

Starting on May 1 2014, all page content in Adobe InDesign that is wider than the margins found on a portrait page need to be added to a page with a true landscape orientation. Why?

In Adobe InDesign:

- Only text with a horizontal alignment on the computer screen can be automatically exported to PDF where page content is tagged to be read correctly by screen readers for the visually-impaired (per Section 508).
- For text that does not have a horizontal alignment on the computer screen:
- It can take significant amount of time and effort to make most, but not all, document text accessible in the final PDF.
 - It is nearly impossible to make non-horizontal text that is also found inside table cells accessible in the final PDF.
 - Setting a single page to landscape format in Adobe InDesign can be tricky, because it can be rather difficult to make sure that the page footers and headers print in the same place on all pages. This usually involves:
 1. Initially place the header and/or footer elements as best you can (using measurements, calculations, visual estimates, etc.).
 2. Export the target landscape page(s), along with at least two adjacent portrait pages to PDF format.
 3. Print-out the PDF file.
 4. Lay a printed landscape page on top of a portrait page with similar header and/or footer treatments, such that the corners of the two pages are perfectly aligned.
 5. Look through both pieces of paper to see whether or not the page footers and/or headers are aligned.
 6. Nudging the landscape page elements in the InDesign file to better align with the portrait page.
 7. Repeating steps 2-6 until the page header and footer elements are aligned correctly.

Note: Many document templates have one set of page header and footer treatments for left-hand facing pages, and separate set of header and footer treatments for right-hand facing pages.

Suggested Procedures for Exporting the final Document to PDF Format

All final PDF versions posted on NPS websites should be exported to meet Section 508 accessibility standards. Detailed guidance for exporting Adobe InDesign documents to PDF format can be found in the document: I&M Guidance for Creating Accessible PDF Documents. The basic PDF export steps below will suffice for a majority of users.

- 1) Adobe Acrobat Pro 10 or higher is recommended.
- 2) The final document must be exported to PDF format in a way that maximizes accessibility (per Section 508).
 - a) Choose the *File / Adobe PDF Presets / High Quality Print* menu option.

Note: The *High Quality Print* export definitions are one of the default export settings built into Adobe InDesign. You may also use a custom set of export definitions.

- b) On the next screen, choose a file name and network drive location, and click the Save button.
- c) On the next screen:
 - i) Make sure that the Compatibility drop-down menu option is set to *Acrobat 8/9 (PDF 1.5)* (or later).
 - ii) Make sure that the *Create Tagged PDF, Bookmarks*, and *Hyperlinks* boxes are checked.
 - iii) Make sure that the *Export Layers* drop-down menu option is set to *Visible & Printable Layers*.
 - iv) Click the *Export* button (this may take a few minutes).
- 3) If you desire to make the final document Section 508 accessible (not required for NRTR, NRR, or NRDS reports - the Fort Collins office does this for you), open the PDF document in Adobe Acrobat Pro, and follow the directions outlined in the document: [Adobe Acrobat Pro Procedures for Producing Section 508 Accessible PDF Documents](#). The basic steps are:
 - a) Use the *Tools / Accessibility / TouchUp Reading Order* tools to check, update, and order the accessibility tags on each individual page.
 - b) The document is ready when the only potential error message returned by the *Tools / Accessibility / Full check* diagnostic tool is:
“Tab order may be inconsistent with the structure order.”

P (paragraph tag) : use this tag for all Paragraph Styles that will be used for any and all text that is not a Heading or an Artifact.

H1- H5 (heading tags) : use these tags for all first through fifth order headings.

Artifact (background element that is skipped by screen readers) : use this tag for all headers and footer text, and is sometimes used for figure captions.

References

The guidance and procedures outlined in this document are a compilation of testing, modifying, and summarizing the information and procedures provided from the following sources.

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